

APPLICATION FOR RECORDS DISPOSITION STANDARD

INSTRUCTIONS: Prepare in duplicate and forward to the Records Management Analyst, Management Systems Division

3. Dept., Division, Subdivision & Administering Office Address Department of Finance and Administration ; Division of Contracts and Procurement Peachtree Summit, 401 W. Peachtree St. NE Atlanta, Georgia 30308		FOR RECORDS MANAGEMENT DIVISION USE Date Received Application No. Date Completed JUL 31 1978 78-148 AUG 8 1978	
4. Person to Contact Allan B. Johnson, Jr.		5. Working Title Manager of Procurement Administration	6. Telephone Number 586-5143
7. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
8. Dates of Series Earliest Latest 1972 Present	9. Records Series Title (followed by title used in office, if different) Procurement Contract Working Files		
10. Division and Office Function What is the function of the Division and the Office in which this record series is created? The Division of Contracts and Procurement is responsible for developing, maintaining, and implementing Authority-wide purchasing procedures, consultant selection procedures, centralized contracting procedures, and all competitive bidding on contracts under MARTA Act. Specifically, the Division is responsible for the purchase of bus parts, materials and services for transit operations; purchase of office supplies, furniture, equipment, miscellaneous services and concessions; administrative management and documentation for all consultant, construction and demolition contracts and federally-funded procurements; maintenance of all official contract files, bidder's lists, vendor file directories, contract lists, and related special reports. The Division is responsible for the retention and maintenance of all contracts and related contract documents so that they are available for audit and periodic review.			
11. Record Series Description Documents relating to: Included are:		This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Preparing approving and mailing bid document, bid opening, bidder evaluation, and award of contracts to provide specific operation items to the Authority. Pre-bid concurrences, advertisements, evaluation memos and concurrences, Board Package, award notices, and all related internal and external correspondence.	
File is arranged:		By Bid Cycle Number, then by Contract Proposal Number within Cycle.	
12. Monthly Reference Rate How often are records referred to which are: One to six months old <u>20 - 25</u> ; Seven to twelve months old <u>5 - 10</u> ; Thirteen to twenty-four months old <u>0</u> <u>5</u> ; twenty-five months and older <u>0</u> ?			
13. Annual Rate of Accumulation of Records Letter-size drawers _____ ; Legal-size drawers _____ ; Shelves <u>3</u> ; Other (specify) _____			

YES	NO	14. Questionnaire (Place an "X" in the proper column)						
X		a. Is this the official copy of the series? If not, where is it?						
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.						
	X	c. Is this a vital record?						
	X	d. Does this series have historical or long term research value?						
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?						
	X	f. Is the information contained in this series ever published? If yes, attach copy.						
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.						
	X	h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?						
	X	i. Is this series (or a major portion of it) regularly microfilmed?						
	X	j. Does the record series result in a computer printout?						
<p>15. Retention Requirements The following requires the series to be kept:</p> <table style="width: 100%;"> <tr> <td style="width: 50%;">a. State Law _____ years.</td> <td style="width: 50%;">d. Audit period _____ years.</td> </tr> <tr> <td>b. Statute of limitation _____ years.</td> <td>e. Administrative need _____ years.</td> </tr> <tr> <td>c. Federal law _____ years.</td> <td>f. Federal retention instructions <u>3</u> years. <i>following the completion of the MARTA project.</i></td> </tr> </table> <p>Attach copy or excerpt of laws or regulations. Explain administrative need.</p> <p style="text-align: center; font-size: 1.2em;"><i>UMTA E.O.M. III D-41 3/11/74</i></p>			a. State Law _____ years.	d. Audit period _____ years.	b. Statute of limitation _____ years.	e. Administrative need _____ years.	c. Federal law _____ years.	f. Federal retention instructions <u>3</u> years. <i>following the completion of the MARTA project.</i>
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c. Federal law _____ years.	f. Federal retention instructions <u>3</u> years. <i>following the completion of the MARTA project.</i>							
<p>16. Approved Disposition Instructions This agency recommends that the file series be cut off at the end of each:</p> <p style="text-align: center;">[] Calendar Year; [] Fiscal Year; <input checked="" type="checkbox"/> Other <u>see below</u> then,</p> <p><input type="checkbox"/> Hold in the current files area _____ month(s) _____ year(s); then</p> <p><input type="checkbox"/> Transfer to local holding area; hold _____ year(s); then</p> <p><input type="checkbox"/> Transfer to State Records Center; hold _____ year(s); then</p> <p><input type="checkbox"/> Destroy.</p> <p><input type="checkbox"/> Transfer to State Archives for permanent retention.</p> <p><input checked="" type="checkbox"/> Other (Specify)</p> <p>Hold in the current files area one year after contract completion or as determined by the Manager of Procurement Administration.</p> <p>Then: transfer to Authority Records Center. Hold for three years past completion of MARTA project.; then destroy.</p> <p>These instructions apply to all prior and future accumulations of the series</p> <p style="text-align: center; font-size: 0.8em;">(Indicate briefly rationale for recommendations above/or write additional remarks):</p>								
<p>17. APPROVALS</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <p>Approved Department Records Management Officer Date</p> <p><i>James J. Baker</i> <u>6-28-78</u></p> <p>Approved Division Head/Designee Date</p> <p><i>Robert C. J. Hall</i> <u>6/28/78</u></p> <p>Approved Department Head/Designee Date</p> <p><i>Robert C. J. Hall</i> <u>7/20/78</u></p> <p>Approved Records Management Analyst Date</p> <p><i>Carolyn L. Haik</i> <u>7/14/78</u></p> </td> <td style="width: 50%; vertical-align: top;"> <p>Approved Legal Counsel Date</p> <p><i>Wayne S. Kowder</i> <u>7/24/78</u></p> <p>Approved Division of Audit Date</p> <p><i>Robert L. Smith</i> <u>7/24/78</u></p> <p>Approved Department of Archives and History Date</p> <p><i>Carroll Ware</i> <u>8-4-78</u></p> <p>Approved MARTA Management Advisory Committee Date</p> </td> </tr> </table>			<p>Approved Department Records Management Officer Date</p> <p><i>James J. Baker</i> <u>6-28-78</u></p> <p>Approved Division Head/Designee Date</p> <p><i>Robert C. J. Hall</i> <u>6/28/78</u></p> <p>Approved Department Head/Designee Date</p> <p><i>Robert C. J. Hall</i> <u>7/20/78</u></p> <p>Approved Records Management Analyst Date</p> <p><i>Carolyn L. Haik</i> <u>7/14/78</u></p>	<p>Approved Legal Counsel Date</p> <p><i>Wayne S. Kowder</i> <u>7/24/78</u></p> <p>Approved Division of Audit Date</p> <p><i>Robert L. Smith</i> <u>7/24/78</u></p> <p>Approved Department of Archives and History Date</p> <p><i>Carroll Ware</i> <u>8-4-78</u></p> <p>Approved MARTA Management Advisory Committee Date</p>				
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